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# PURCHASING USER MANUAL

## REQUISITIONS YOU ARE UNABLE TO APPROVE

### INTRODUCTION

Requisitions or requisition line items shaded in purple mean that you cannot approve them. Click **Approve** next to a requisition and then click a line item **Menu** and **Show Reason** to find out why you cannot approve the item.

Figure 1 – Items you cannot approve

Status: Awaiting Line Approval

Approve Unapprove

Total: \$12,200.00 ☐ Show Vendor Info ☐ Show

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	TC	R	Encumb	S	FY	Mod	Index	PCA	SubObj	Dtl	Gran
Menu		Awaiting Mgr		Microwaves	2	Each	\$100.00	\$200.00	230				2008		1002	01010	5050		
Menu		Awaiting Mgr		boats	2	Each	\$6,000.00	\$12,000.00	230				2008		1002	01010	5101		

Cannot approve this line item

Show History  
Show Full Description  
View Ship-To Address  
View Bill-To Address  
Show Reason

### ADMINISTRATION SETTING THAT RESTRICT APPROVALS

This is usually due to restrictions set by your Purchasing administrator, such as:

- You are not part of the requisition workflow. Your administrator will set up your workflow:

Figure 1 - Administration workflow set up

Workflow Department

Work Flow		Worker Levels		Worker Level 1 Level Approvers	
Workflow	Active	Level		Approver	Active
Select Edit Del CSC	✓	Select Edit Del Worker Level 1	Up Dn	Edit Del ROCHENDA REYNOLDS	✓
Select Edit Del Worker	✓	Select Edit Del Worker Level 2	Up Dn	Add TU ANH BOCKENSTETTE	✓
Add	✓	Add			

- B. You are not part of the Requisition Department and your administrator has restricted approvals by department. Your administrator will set up your Agency rules and the Requisition Department users.

Figure 2 - Administration Restrict Approvals and Department Users

**User Maint** | **Agency** | Address | PO Notes

☒ Auto Authorize Requisitions  
☐ PO Assigner Required  
☒ PO Approver Required  
☒ Receivers can see Item Prices

☒ Email Notification  
☐ Restrict Req Approver  
☒ Restrict Approval by Req Department

**Workflow** | **Department** | W9 Upload

☒ Req Departments ☐ PO Departments

Code	Department	Auto Req#	Format
Select Edit Del DSA	Statewide Accounting	✓	DSAYy999
Select Edit Del SYS	Systems Admin.	✓	SYSy999
Select Edit Del WRK	Worker Dept	✓	WRKy999

Add

**Department SYS Users**

**Department Users**

Del CONNIE HILL  
 Del MARY EVERILL  
 Del TU ANH BOCKENSTETTE  
 Add TU ANH BOCKENSTETTE

**Format notes:**  
 Lowercase yyyy, yy, y = Calendar Year  
 Lowercase ffff, ff, f = Fiscal Year  
 Uppercase letters and special characters = Department Code  
 Digit 9 = sequence number (must be unique)  
 Examples:  
 ABCyy999 = 'ABC' + last two digit sequence number  
 ffff9999 = four-digit Fiscal Year  
 999ABC = Invalid Format  
 Sequence Number rollover:  
 Formats with a Calendar Year or year changes.

- C. The line item(s) have fiscal coding or a dollar amount which your approval rules do not allow you to approve. Your administrator will set up your approval rules.

Figure 3 - Administrative set up of Approval Rules

**Save** | **Approval Rules for RON REYNOLDS**

All None Exceptions

Index ☒ ☐ ☐ 1030, 2500, 2502

Grant ☐ ☒ ☐

Project ☐ ☐ ☒

Sub Object ☐ ☒ ☐

Fund ☐ ☒ ☐ 0001, 0050, 0050-02, 0052

Budget Unit ☐ ☒ ☐

Min Amount

Max Amount  (Use 0.00 for no Maximum)

- D. You created the requisition and you are an approver, but the administrator has restricted approvers from approving their own requisitions. Your administrator will set up your Agency rules.

Figure 4 - Administrative Agency Restrict Approver set up

**User Maint** | **Agency** | Address | PO Notes

☒ Auto Authorize Requisitions  
☐ PO Assigner Required  
☒ PO Approver Required  
☒ Receivers can see Item Prices

☒ Email Notification  
☒ Restrict Req Approver  
☐ Restrict Approval by Req Department

Delegated Amount \$ 5000.00  
 PO Pct Variance 0

**Update**